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PURCHASING USER MANUAL

CREATING REQUISITION WORKFLOWS

INTRODUCTION

A workflow is the path for routing a requisition to a person or a group of people for approval. Three components make up a workflow: 1) the workflow name, 2) the workflow approval level(s), and 3) the individual approvers. You can create as many workflows as necessary for your business, each with as many approval levels and as many users as needed. Once a workflow is used (requisition items are assigned to it), the only changes you can make are to add or remove approvers, rename the approval levels, and rename the workflow.

A requisition can be made up of several line items. The requisition as a whole can be assigned to a department. The individual items are assigned to one or more workflows, based on however an agency decides, e.g., by the commodity or the amount, etc. The requisition line items must be assigned to the same workflow as the approvers for the approvers to be able to approve the line items.

TO CREATE A REQUISITION WORKFLOW

1. Click the **Agency** tab and then click the **Workflow** tab.
2. Type a name for the **Workflow** (approximately 50 characters). The name you use will appear as the labels for the subsequent sections (described below). Be sure the **Active** check box is checked.

Figure 1 - New Workflow

The screenshot shows the 'New Workflow' form. The 'Agency' tab is active. Under the 'Agency' tab, there are two columns of checkboxes. The first column contains: 'Auto Authorize Requisitions' (unchecked), 'PO Assigner Required' (unchecked), 'PO Approver Required' (unchecked), and 'Receivers can see Item Prices' (checked). The second column contains: 'Email Notification' (unchecked), 'Restrict Approver' (unchecked), and 'Restrict Approval by Department' (unchecked). Below these checkboxes is a text field for 'Delegated Amount' with the value '\$5000.00' and an 'Update' button. Below this, there are two tabs: 'Workflow' and 'Department'. The 'Workflow' tab is active. Under the 'Workflow' tab, there is a text field for 'Work Flow' with the value 'Printing' and an 'Add' button. There is also an 'Active' checkbox which is checked.

3. Click **Add**.

4. Click **Select** next to the Workflow. The '**Workflow**' **Approval Levels** section will appear. (The name of the workflow approval level corresponds to the name of the workflow.)
5. Type a name for the '**Workflow**' **Approval Level** (approximately 50 characters).

Figure 2 - New Workflow Approval Level

6. Click **Add**. NOTE: You can sort the hierarchy of approval levels by clicking **Up** or **Dn** next to each level. However, once a workflow has been used (a requisition assigned to it), you will not be able to change the order of the approval levels.
7. Click **Select** next to the '**Workflow**' **Approval Level**. The **Approvers** section will appear (labeled with whatever you named the workflow approval level). The approval levels are in hierarchical order. That is, a requisition must be approved by the first level before it can be approved by the second level.
8. Select the approver name(s) from the drop down menu and then click **Add**. You can assign the same user(s) to different approval levels. You can also assign the same user(s) to different workflows.
NOTE: You can also add users to workflows and levels on the **User Maint** screen.

Figure 3 - Add approvers

NOTE: You do not assign approvers in a hierarchical order. To create a workflow so that a requisition has to be approved by one person before it can be approved by another, you must create separate approval levels (which are in hierarchical order), and then assign the approvers to each individual level in the order that you want.

9. To change the name of a workflow or workflow approval level, click **Edit** next to the workflow or level, change the name, and then click **Update**.
10. To delete a workflow, click **Del** next the workflow. All associated levels will be deleted. However, once a workflow has been used (a requisition assigned to it), the workflow cannot be deleted and **Del** will be disabled, even if *all* requisition items in the workflow have been processed. Once a workflow is used, the only changes you can make are to add or remove approvers, rename the approval levels, and rename the workflow.

The requisition line items must be assigned to the same workflow as the approvers for the approvers to be able to approve the line items.

EXAMPLES OF REQUISITION WORKFLOWS

Below are three examples of requisition workflows, indicating workflows by bureau, office function, location, etc.

Figure 4 - Workflow example 1

Workflow		Department	
Work Flow			
Workflow	Active		
Select Edit Del CSC	✓		
Select Edit Del Admin	✓		
Select Edit Del SCO	✓		
Select Edit Del Accounting	✓		
Select Edit Del test	✓		
Select Edit Del Worker	✓		
Select Edit Del walkthru	✓		
Add	<input type="checkbox"/>		
Admin Levels			
Level			
Select Edit Del Mgr	Up Dn		
Select Edit Del Division	Up Dn		
Select Edit Del Fiscal	Up Dn		
Select Edit Del Adm	Up Dn		
Add	<input type="text"/>		
Mgr Level Approvers			
Approver	Active		
Edit Del TU ANH BOCKENSTETTE	✓		
Edit Del JAMES CARTER	✓		
Edit Del DAN GREITZER	✓		
Edit Del SUANNE KORA	✓		
Edit Del PAMELA MENJIVAR	✓		
Add	<input type="checkbox"/>		

Figure 5 - Workflow example 2

Workflow		Department	
Work Flow			
Workflow	Active		
Select Edit Del IT	✓		
Select Edit Del General	✓		
Select Edit Del Western	✓		
Select Edit Del Eastern	✓		
Select Edit Del Northern	✓		
Select Edit Del Southern	✓		
Add	<input type="checkbox"/>		
Eastern Levels			
Level			
Select Edit Del Supervisor	Up Dn		
Add	<input type="text"/>		
Supervisor Level Approvers			
Approver	Active		
Edit Del JOHN HAMMOND	✓		
Add	<input type="checkbox"/>		

Figure 6 - Workflow example 3

Workflow		Department	
Work Flow			
Workflow	Active		
Select Edit Del Consumer	✓		
Select Edit Del Criminal	✓		
Select Edit Del Water	✓		
Select Edit Del FRAUD	✓		
Select Edit Del FISCAL	✓		
Add	<input type="checkbox"/>		
Consumer Levels			
Level			
Select Edit Del Admin Assistant	Up Dn		
Select Edit Del FISCAL	Up Dn		
Select Edit Del BOSS	Up Dn		
Add	<input type="text"/>		
Admin Assistant Level Approvers			
Approver	Active		
Edit Del TRUDY JACKSON	✓		
Edit Del PABLO PICASSO	✓		
Edit Del RANDY TILLEY	✓		
Edit Del KARL VOGT	✓		
Add	<input type="checkbox"/>		